Contractual Changes

1 Introduction

The purpose of the user guide is to provide information, procedures and instructions to help you maintain an employee's contractual information within the Trent HR system, including:

- Work Hours
- Salary
- Working Pattern
- Funding
- Contractual Elements
- Extensions to Tenure

1.1 Where to Find the Data

Most of the options listed can be located in the Positions area of the People module using the following navigation path:

Navigate: Organisation > People (select the employee) > Employment > Positions (select position)

1.2 Effective Dates

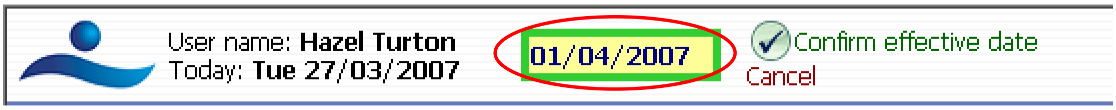
Whenever changes to position details are required, you must ensure that the effective date of the change is entered. This is achieved in two ways and is dependant on the item being changed.

- Using the Effective Date field in the Control Bar

- Completing the Start Date field in the relevant form

Once you choose the appropriate form for the change, Trent will wait for you to enter the date in the Effective Date field in the Control Bar.

1.2.1 Using the Control Bar



Enter the required date and click on the ‘Confirm effective date’ option next to the field or press Enter.

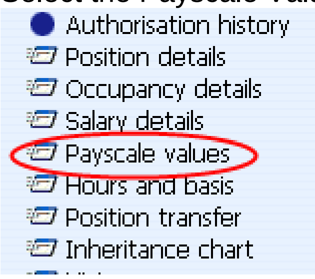
2 Changing Salaries

For changes to salary, you need to ascertain whether the employee is being paid via a Payscale (i.e. on a recognised grade) or a Spot Salary. You may then access the relevant form to make the changes.

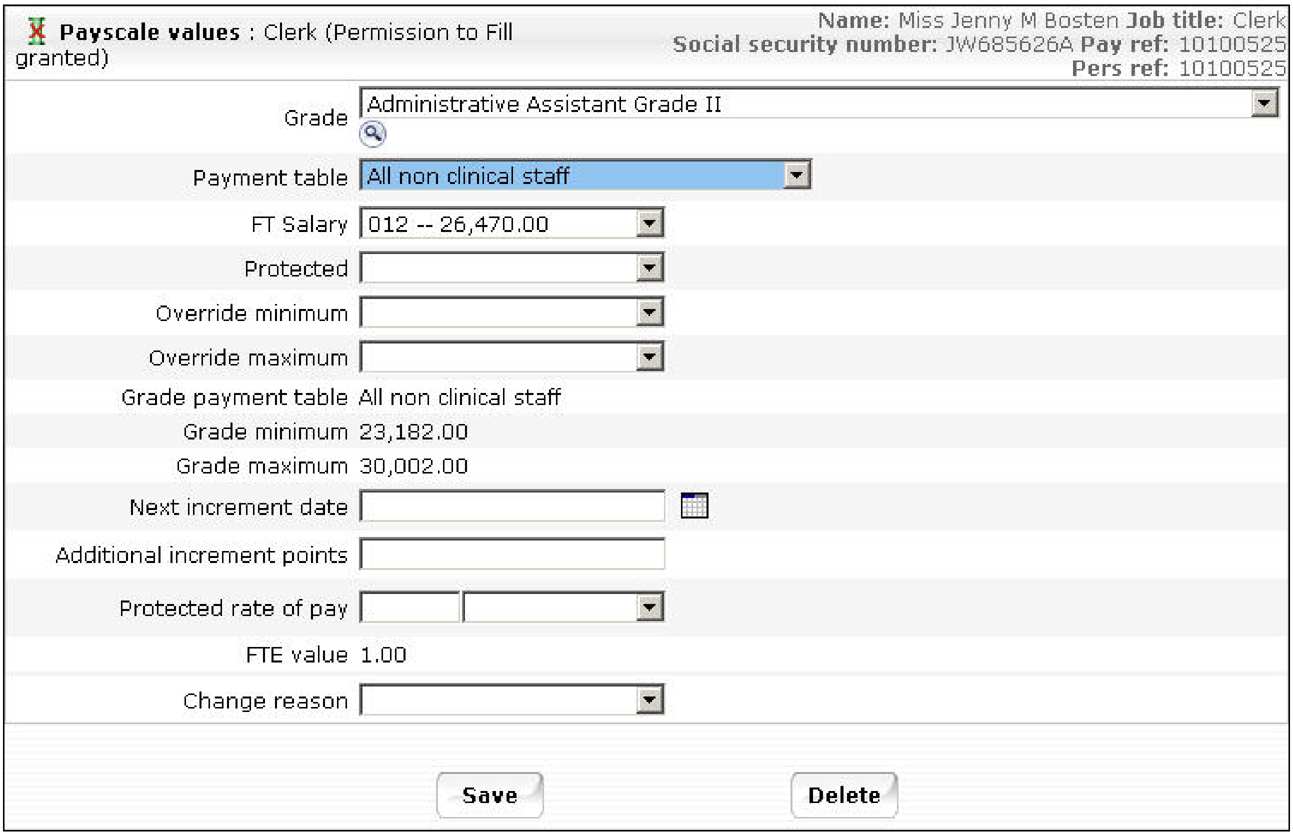
2.1 Payscale Salaries

1. With the University of Cambridge selected, click on Organisation explorer.
2. Enter the correct effective date
3. Select People and search for the person whose salary is being changed
4. Choose Employment, positions

5. Select the Payscale Values form



6. The payscale values form will be displayed.



Payscale values : Clerk (Permission to Fill granted)

Name: Miss Jenny M Bosten Job title: Clerk
Social security number: JW685626A Pay ref: 10100525
Pers ref: 10100525

Grade	Administrative Assistant Grade II
Payment table	All non clinical staff
FT Salary	012 -- 26,470.00
Protected	
Override minimum	
Override maximum	
Grade payment table	All non clinical staff
Grade minimum	23,182.00
Grade maximum	30,002.00
Next increment date	
Additional increment points	
Protected rate of pay	
FTE value	1.00
Change reason	

Save Delete

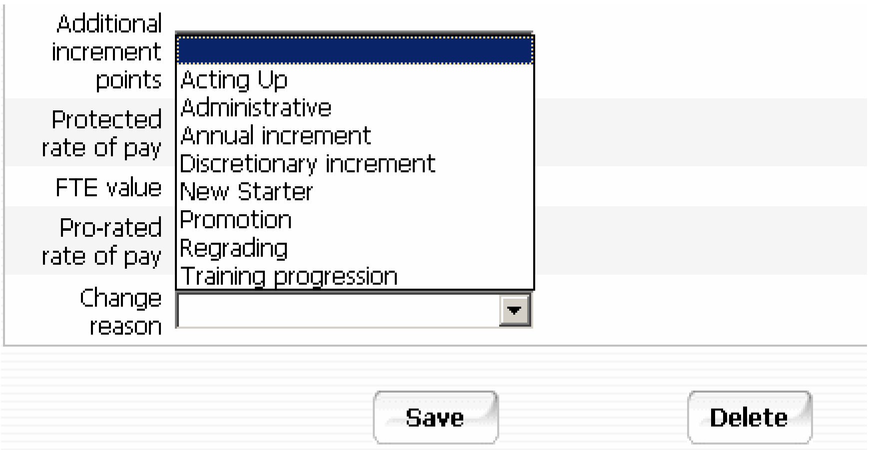
7. Select the Spinal Point (from the FT salary drop down box), and type in the next increment date

   Where the salary is within the normal range for the grade (i.e.within the service band) the override maximum should be set to the grade maximum (i.e. the top service point) and the FT Salary point will be less than or equal to the grade maximum.

   Where the salary is within the contribution band the override maximum should be set to the same point as the FT Salary point.

   Where a personal bar is set the override maximum and the FT Salary point should be less then the grade maximum

8. Click the drop down arrow to the right of change reason and select the reason for the change

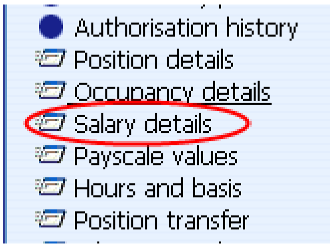


9. Click the 

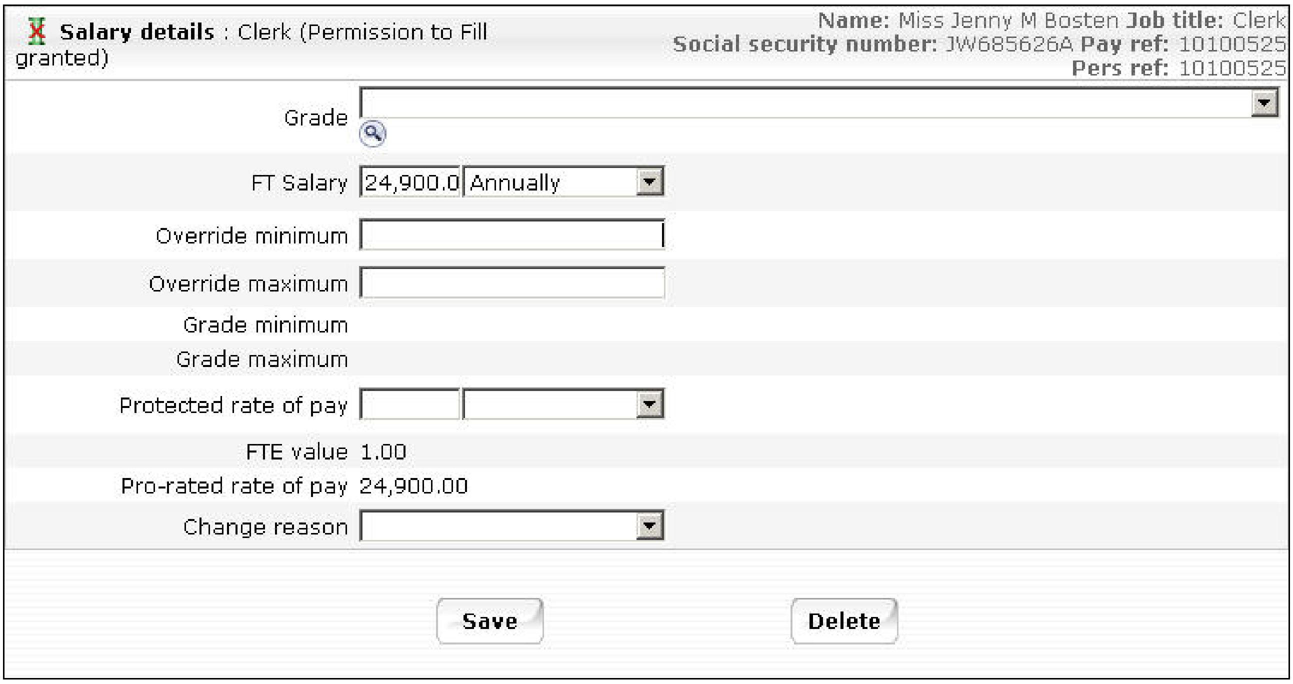
button

2.2 Spot Salaries

1. Follow steps above, but select the Salary Details form



2. The salary details form will be displayed.



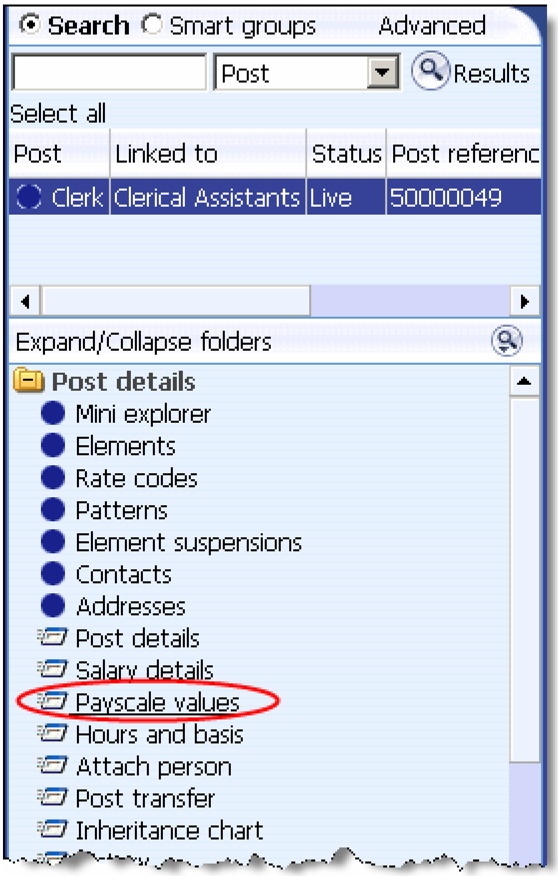
3. Enter the salary in the FT Salary field and the select the frequency from the drop down list.

4. Click the  button.

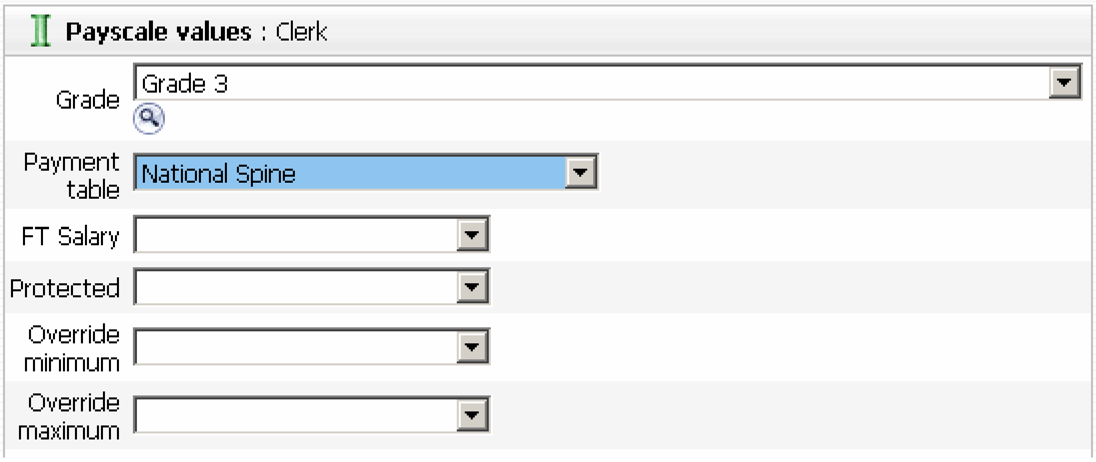
2.3 Post Re-Grade

Where a Post has been re-graded:

1. With the University of Cambridge selected, click on Organisation explorer.
2. Enter the correct effective date
3. Select Posts and search for the required Post
4. Select Payscale details



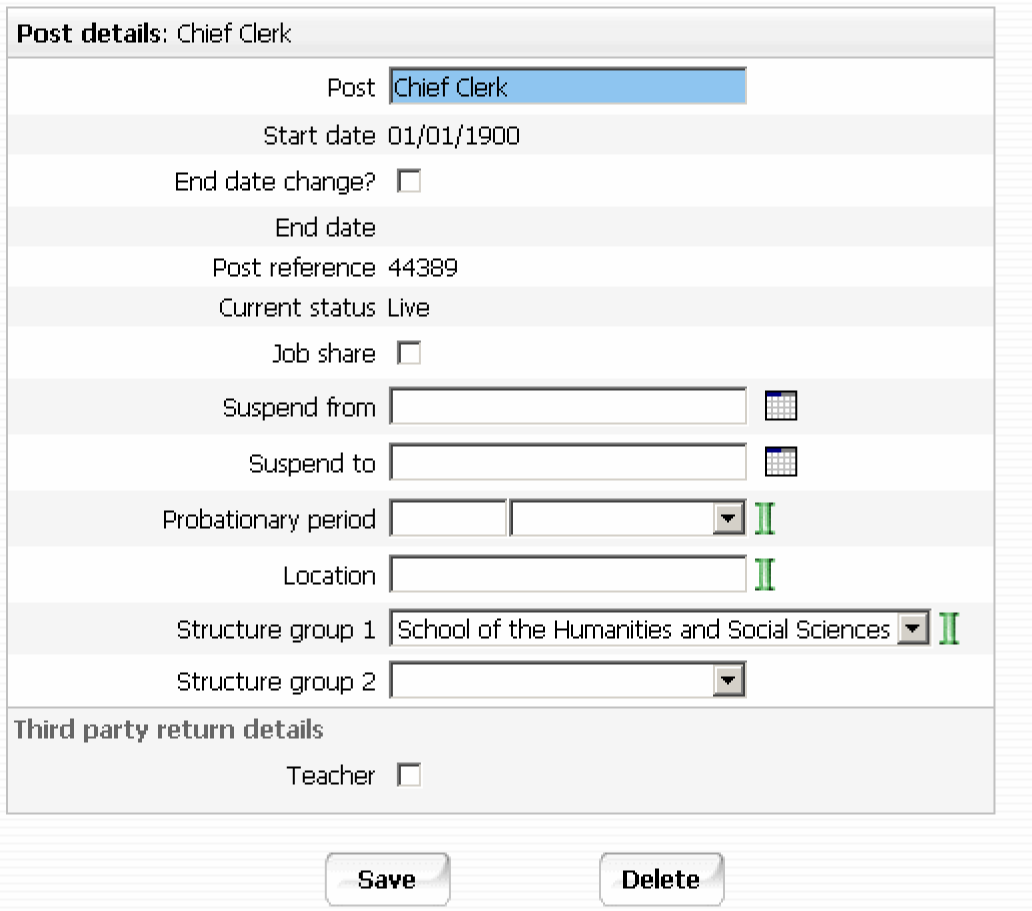
5. The Payscale values form will be displayed



6. Select the required grade
7. Click the  button.

3 Changing Post Title

1. With the University of Cambridge selected, click on Organisation explorer.
2. Enter the correct effective date
3. Select Posts and search for the required Post
4. Select Post details


Post details: Chief Clerk

Post	Chief Clerk
Start date	01/01/1900
End date change?	☐
End date	
Post reference	44389
Current status	Live
Job share	☐
Suspend from	
Suspend to	
Probationary period	
Location	
Structure group 1	School of the Humanities and Social Sciences
Structure group 2	

Third party return details

Teacher	☐

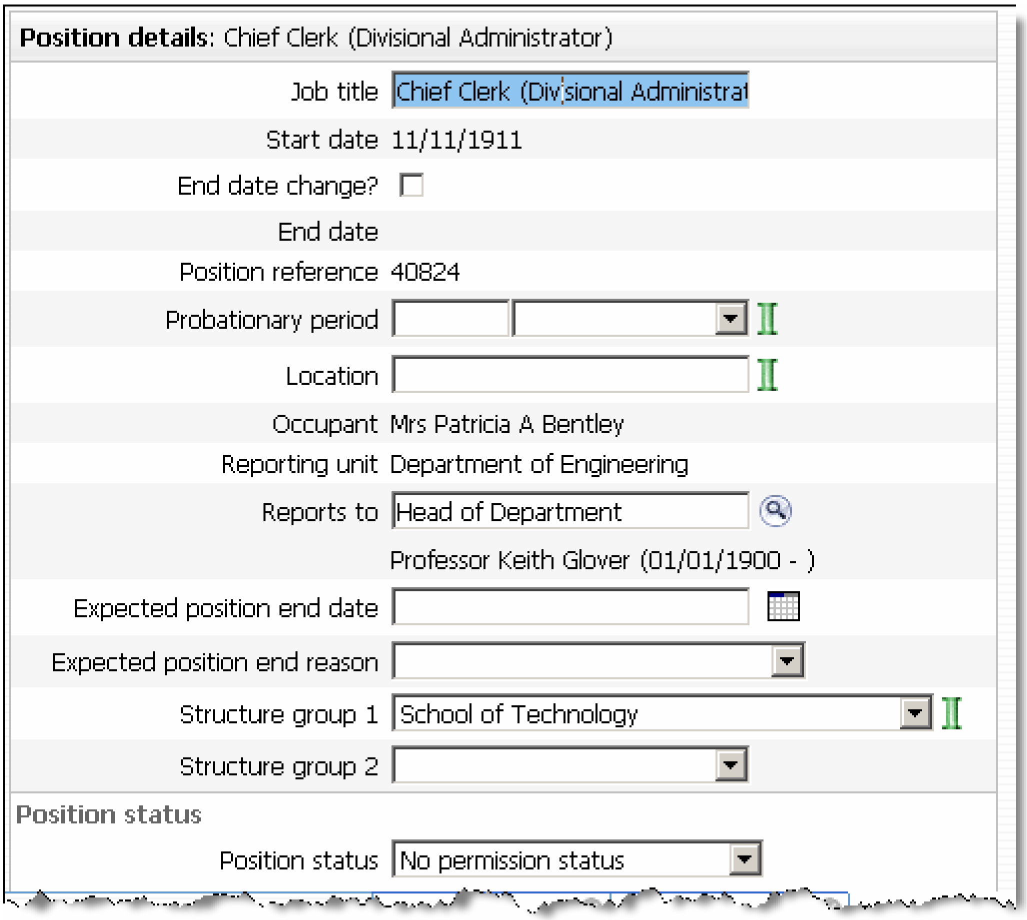
Save Delete

5. Amend the Post title in the first field of the form
6. Click the **Save** button

3.1 Changing Position Title

1. With the University of Cambridge selected, click on Organisation explorer.
2. Enter the correct effective date
3. Select People and search for the person whose position title is being changed
4. Choose Employment, positions

5. Select Position details

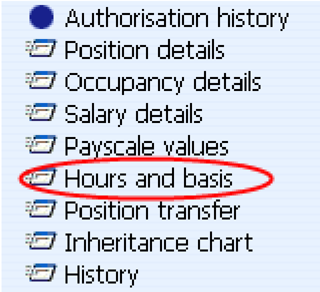


6. Amend the job title in the first field of the form (note that you can type more characters than the display allows you to view)
7. Click the 

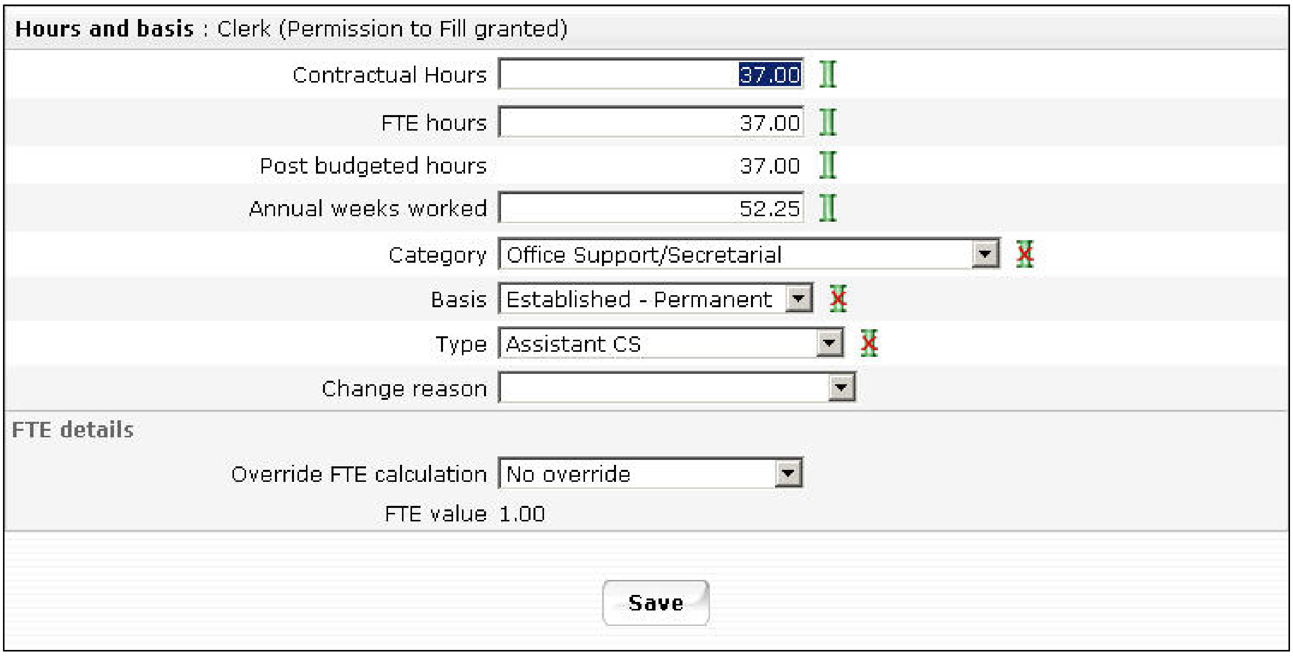
button

4 Changing Hours

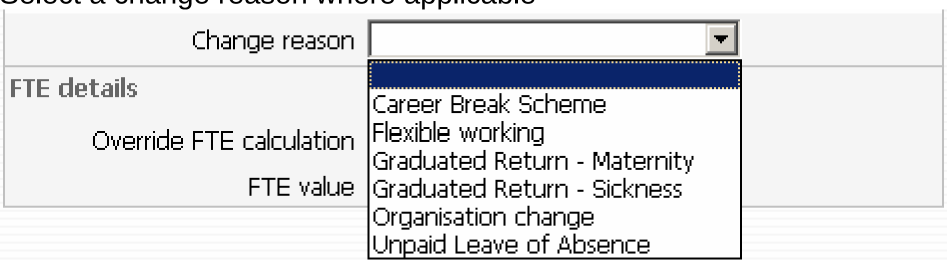
1. Select the Hours and Basis form from the Position menu



2. The Hours and Basis form will be displayed



3. Enter the required changes to Contractual Hours.
4. Select a change reason where applicable

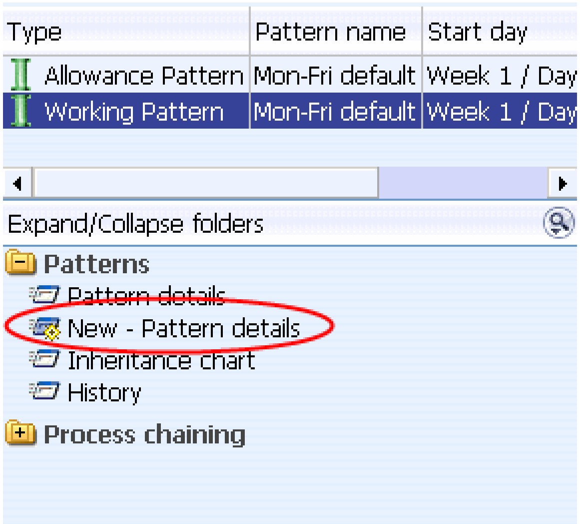


5. Click the 

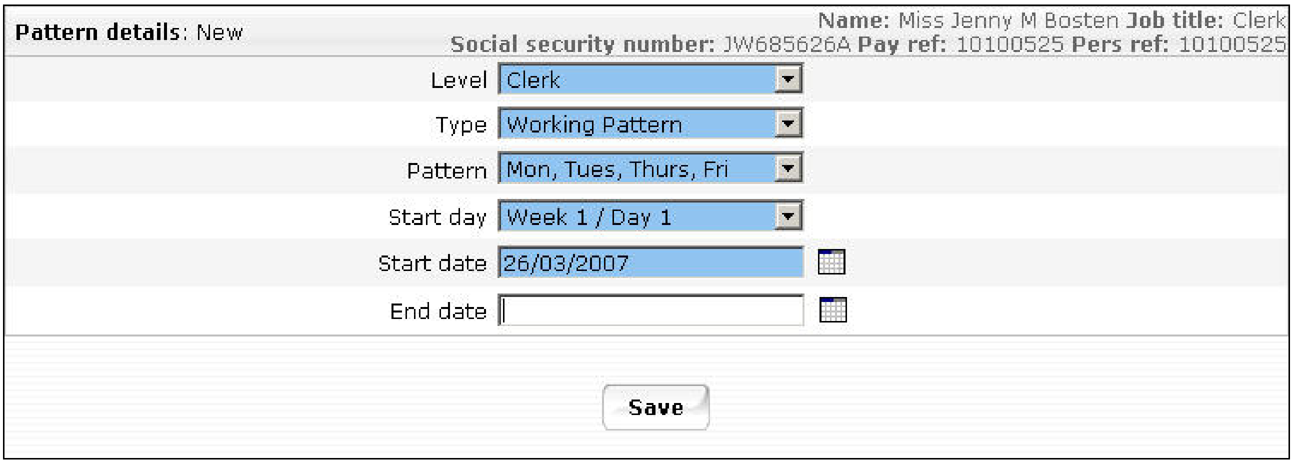
button

5 Changing Working Patterns

1. In order to change an employee's working pattern, you need to click the Patterns option from the Position menu. Select Working Pattern and choose the New – Pattern Details form.



2. The pattern details form will be displayed.

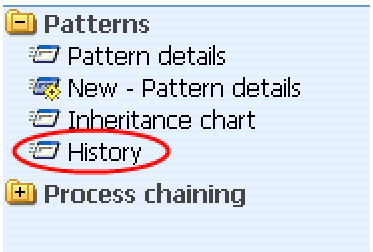


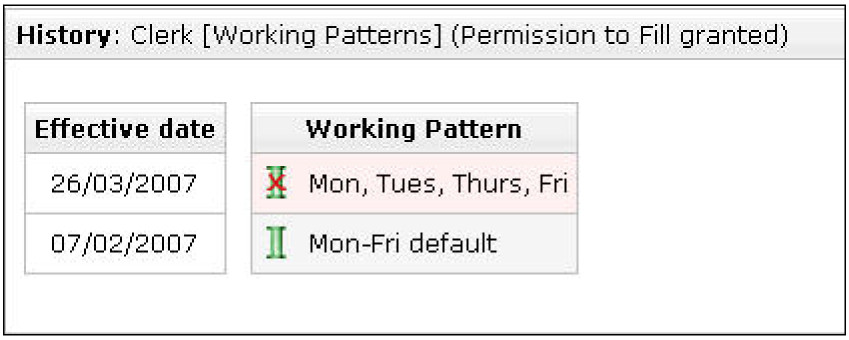
2. Select the appropriate position from the Level drop down box and select Working pattern from the Type field
3. Choose the new pattern from the drop down box on the Pattern field and add the details for the Start Day and Start Date (if the start date is a Monday then the start day is week 1/ Day 1, if the start date is a Tuesday, then the start day is week 1/ Day 2)
4. Click the 

button.

Note that if you are setting this change up in the future, but your effective date at the top of the screen is todays date, you will not see this change in the object pane. Use the History screen to view your changes.

Trent will automatically place an end date against the original pattern, and the new one will be used from the start date entered. To view a history of the changes, select the History option.





History: Clerk [Working Patterns] (Permission to Fill granted)

Effective date	Working Pattern
26/03/2007	Mon, Tues, Thurs, Fri
07/02/2007	Mon-Fri default

6 Changing Permanent Elements

Elements are a part of someone's pay and can include additional allowances or deductions. The term permanent means that it is received/deducted on a regular basis.

6.1 Frequency

Allowances can vary in frequency, i.e. an allowance may be paid every month, every quarter or even annually. However, the user will not need to worry about this as each individual element's frequency will be specified when the system is configured and hence the correct payment will be made automatically.

Trent provides the option to enter "end dates" for allowances to ensure that payment is automatically stopped at a particular point in time. As all allowances are date effective there is also the added benefit that any back pay will automatically be calculated and paid during the payrun following the entry of the allowance.

6.2 Attributing an element to a position

The element Basic Pay will be attached to the post and details will then be inherited down to the post holder.

Sometimes a specific position will attract certain additional payments, (contractural elements). E.g. Early Morning Supplement, Head of Department; and will be attached by the East Room

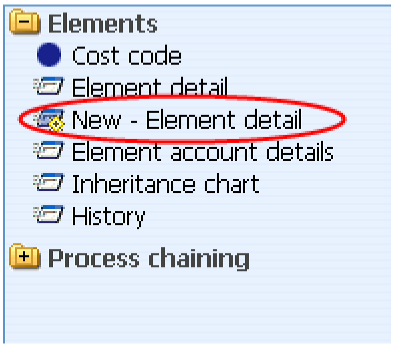
Elements specific to the individual will be attached on an individual basis by the Payroll Team after the employee has been attached to the payroll. E.g Childcare vouchers

Permanent elements set up for a new starter by the East Room will be reviewed as part of the Payroll process chain.

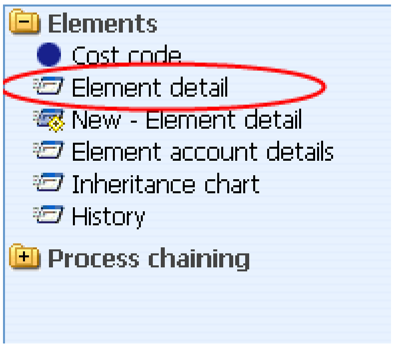
6.3 Attaching elements

5. In order to change an employee's permanent payment elements, you need to click the Elements option and choose either:

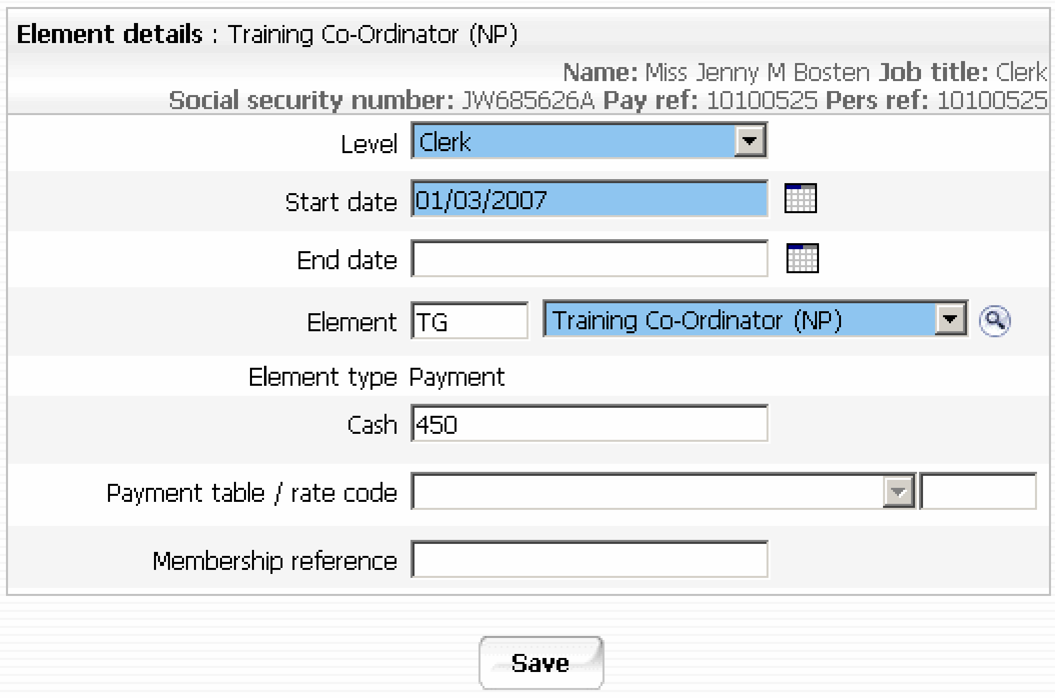
- New – Element Details to add new elements



- Element Details to view and/or amend existing elements



6. Select the position from the Level drop down box (not the contract). As a general rule, if the element is an allowance it will be attached at position level, whereas if it is a deduction it will be attached at contract level.



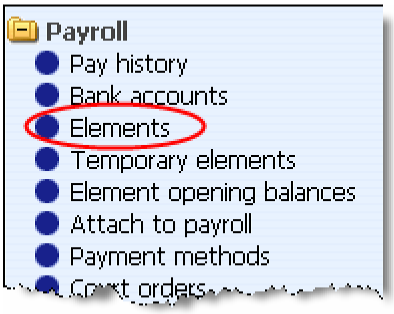
7. For new elements, enter a start date. If the element is to be paid for a set period of time enter an end date.
8. Select the element from the drop down box on the Element field. (NP stands for non-pensionable). For existing elements enter the end date or change required.
9. For a cash based element enter the annual cash amount of the allowance in pounds and pence.
10. Click the **Save** button.

6.4 Element Costing

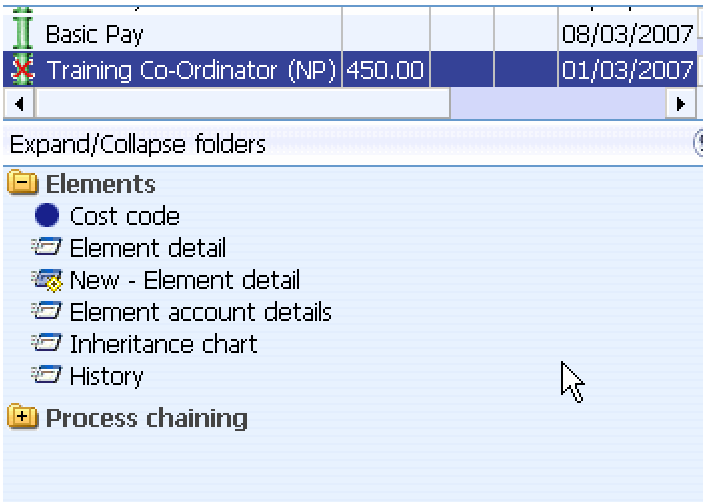
The element will be costed to the employees 'home' cost centre(s) as default.

If the element is to be to a different cost code than basic pay this needs to be actioned through **People > Payroll > Elements**

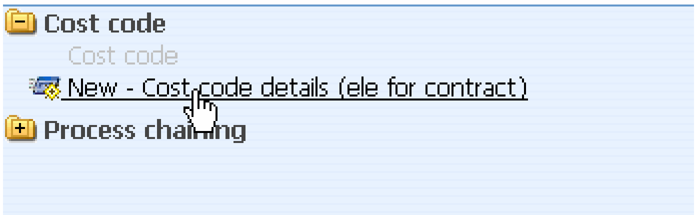
1. With the University of Cambridge selected, click on Organisation explorer.
2. Enter the correct effective date
3. Select People and search for the required person
4. Select the Payroll menu
5. Select Elements



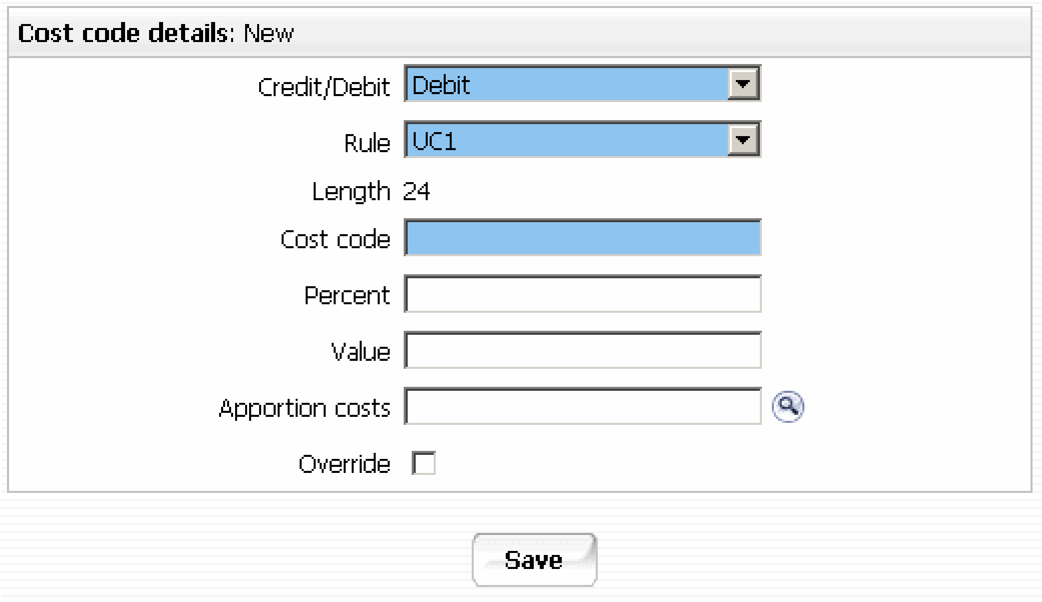
6. The existing elements for the person will be displayed. Select the element that requires the costing to be changed.



11. Select Cost Code, and New – Cost code details (ele for contract)



12. Select the Rule (there's only one, UC1) from the drop down box

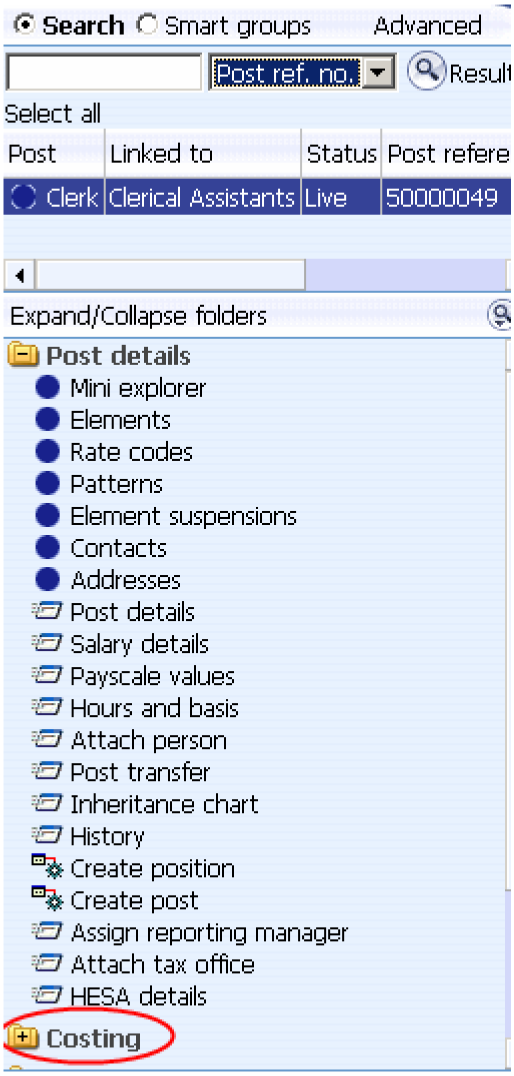


13. Fill in the Cost code for the element
14. Percent should be set to 100
15. Value is left blank in most cases.
    This can be used if you wish to cost a set amount of a payment elsewhere (i.e. employee gets £500 allowance and £200 of it is funded by another dept regardless of whether the £500 changes)
16. Apportion costs is not used, leave this field blank
17. Override should be ticked as this then ensures that any additional values entered against this element are costed to the same place (i.e. backpay)
18. Click the  button.

7 Changing Cost Details

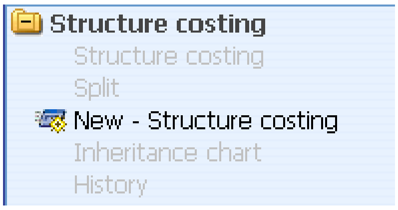
In order to change costing details, you need to click the Structure Costing option in the Costing folder.

1. Search for the relevant Post.
2. Select Costing

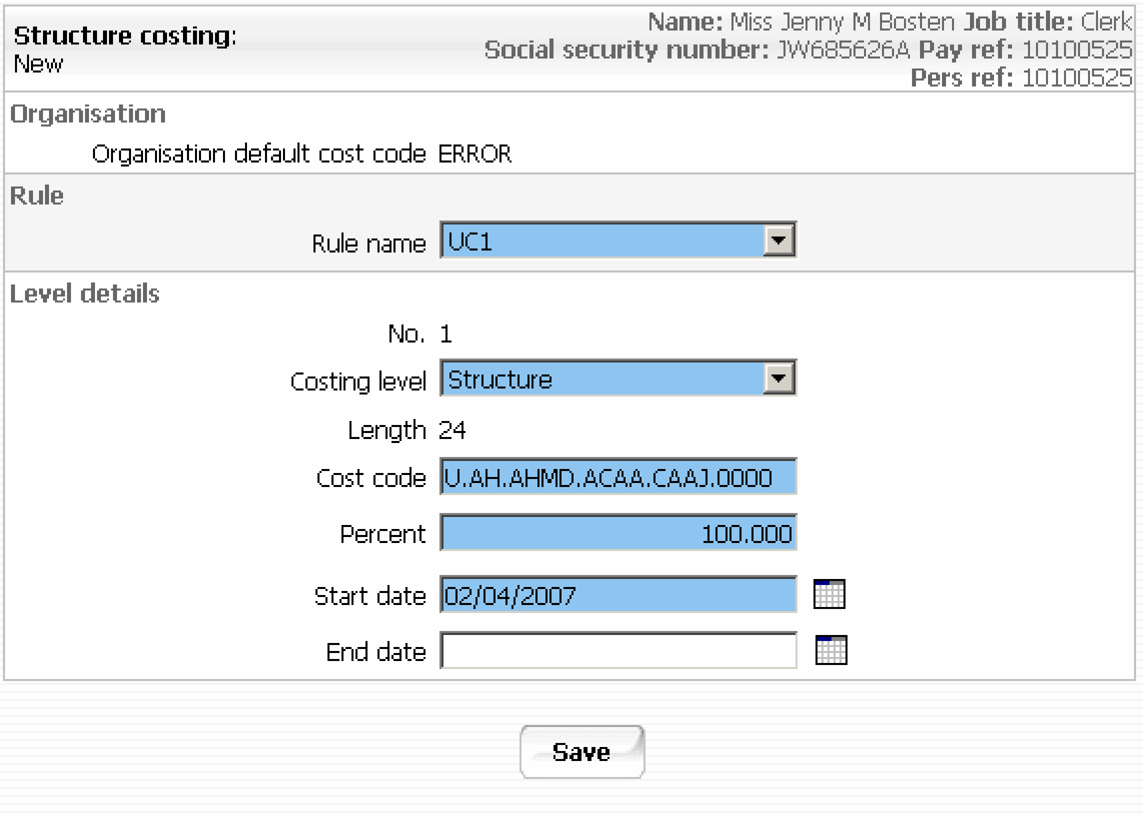


and choose either:

- New – Structure Costing to add new details



- Structure Costing to view and/or amend existing elements



3. When entering new costing details, the Rule name will always default to UC1. "Structure" is the only choice for Costing level. Enter the Cost Code, this must be 24 characters.

For example:

	Dept Code	Cost Centre	Source of Funds	Transaction Code	Spare
U.	MA.	MABA.	ABAA.	ABAP.	0000

Or for Research Grants

Project Code	Task	Award	Transaction Code
AAAG/001.	01.	RG12345.	ABAE

Enter 100 Percent and Start Date fields.
Only enter an End Date when there is a definitive end.

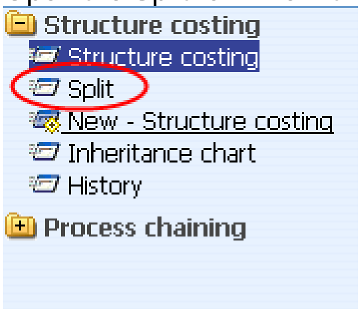
4. Click the Save button

7.1 Split costing

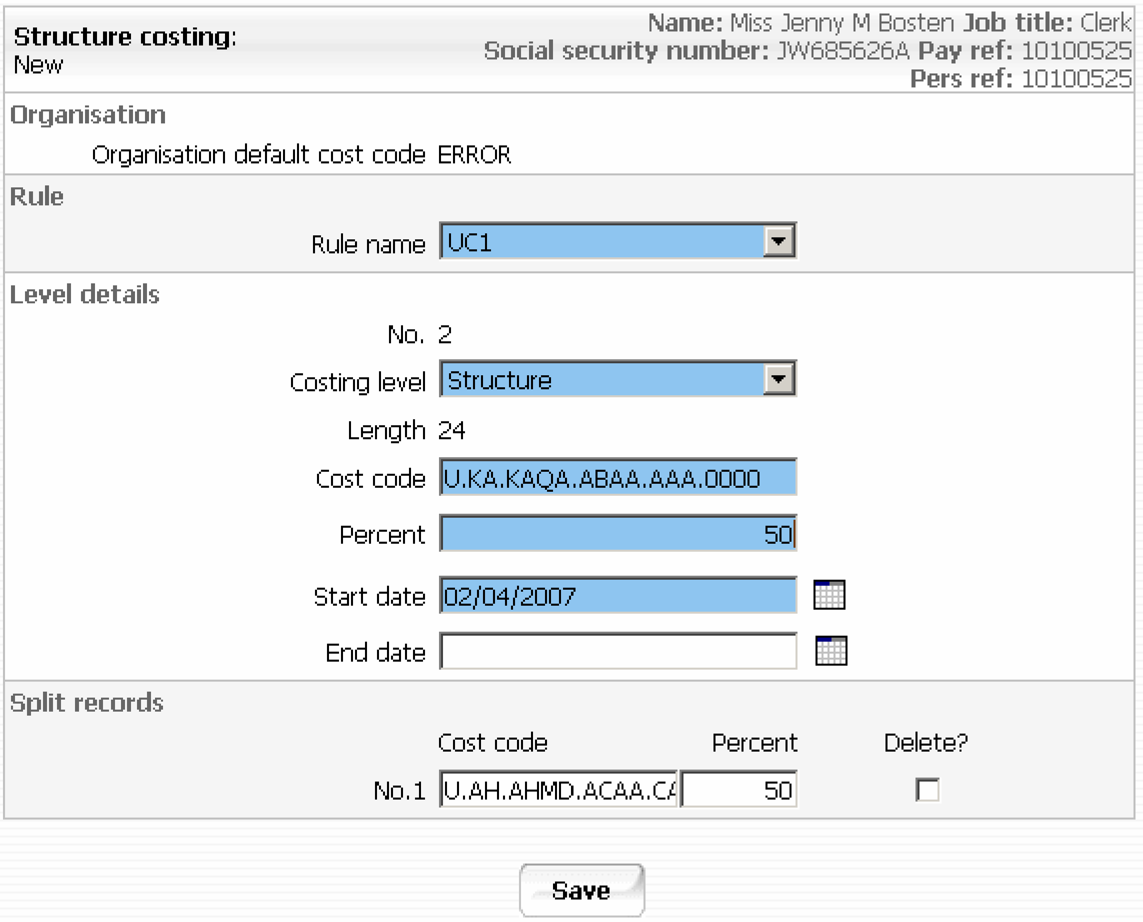
If the position is to be charged to more than one account

1. Enter the first cost code as instructions above

2. Open the Split form from the Structure Costing options



3. Enter the details for the second code and percentage and adjust the percent for the first code in the box called “Split records”. The total % must be 100 at all times.

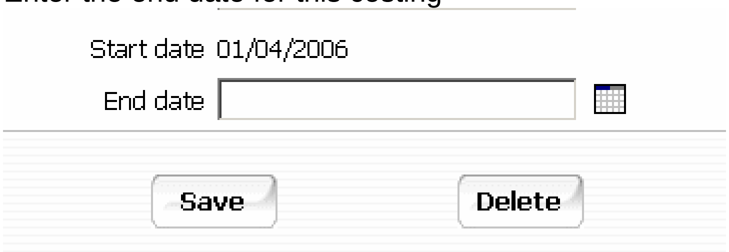


4. Click the Save button.

If a three or more way split is required, split two ways first, then split the second costing and so on. (You cannot split the first costing again)

7.2 To Amend Costing After Start Date

1. Set the effective date to be the end date of the current code (the day before the start date of the new entry)
2. Select the cost line in the object pane which has the highest sequence number (This will be the last line in the object pane)
3. Enter the end date for this costing



4. Click on the  button
5. Select the remaining code(s) from highest to lowest sequential number in turn and end date each and save.
6. Navigate back to the post using the navigation trail to exit the screen.
7. Set the effective date to be the start date of the new costing.
8. Select the Costing menu and choose Structure Costing, New – Structure Costing. Enter the first cost code with the same start date as the set effective date with 100% allocation.
9. Click the  button
10. Open the split form from the costing menu
11. Enter the next code with it's % and amend the first code % at the bottom of the screen so that they total 100%
12. Repeat this process for each subsequent cost code required.

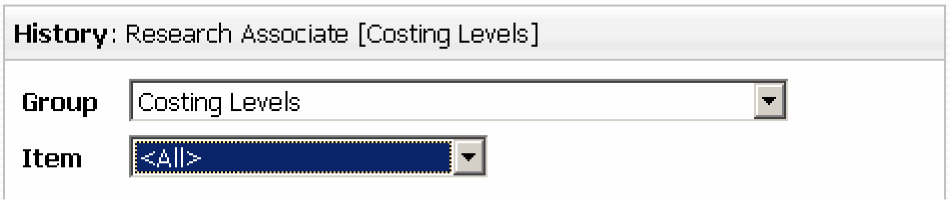
Note: Take great care when entering end dates for costing.

It is not possible to amend the end date once entered. To remove a costing end date you would need to re-input it from the day after the original end date (the original end date then disappears) To bring forward a costing end date, you would need to re-input the costing after the end date and then put in the new end date.

7.3 Retrospective Costing Changes

To View History

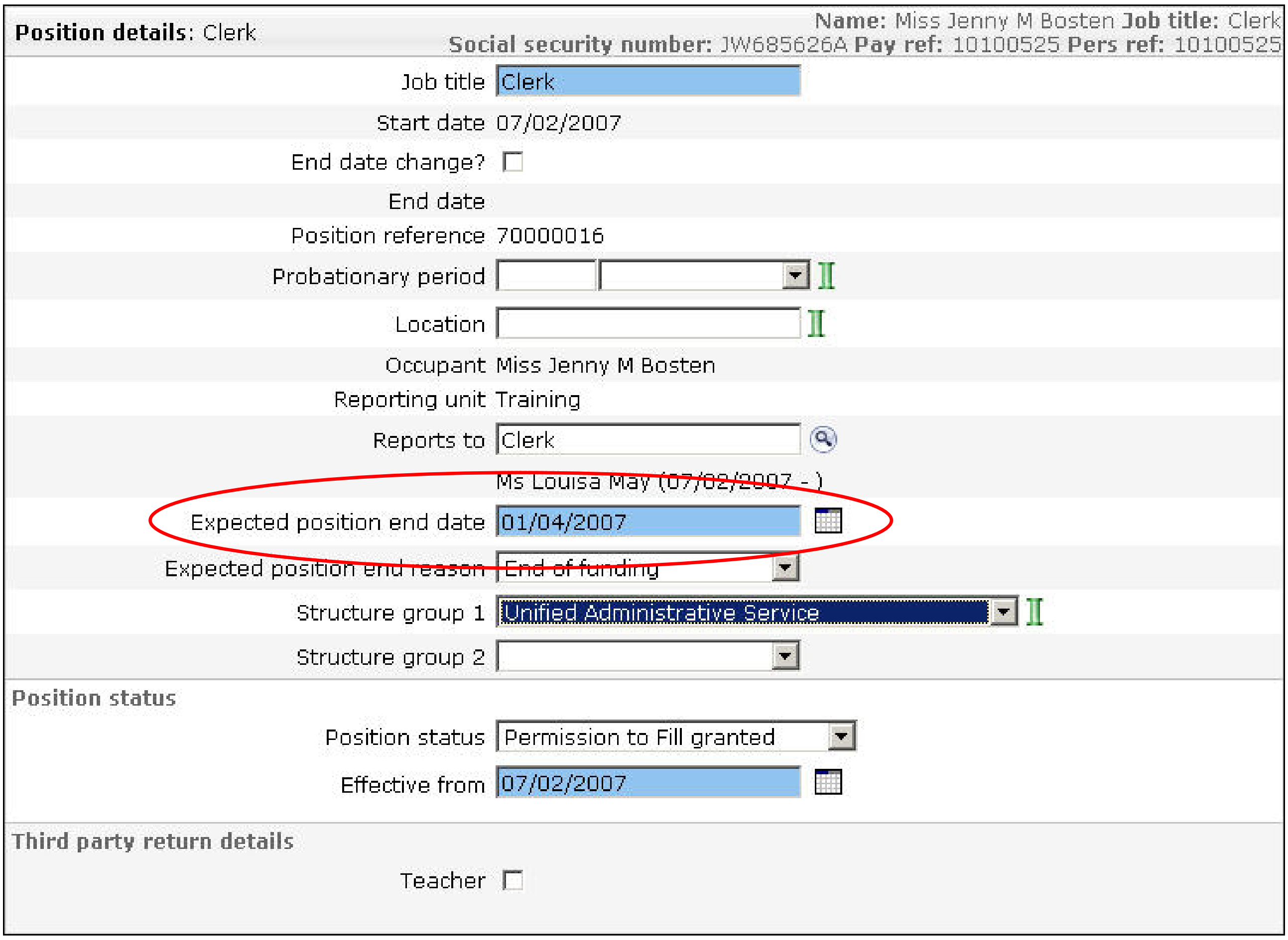
1. Select the Post and choose History from the Post menu (do not use history from the costing menu)
2. In the Group drop down box select Costing Levels.



8 Changes to Tenure

When a position is created that has a fixed term tenure, an expected end date will have been entered into the Expected End Date fields on both the Position Details and Occupancy Details forms.

When this tenure requires extending you need to open these forms in turn and enter the new expected end date and then click on the Save button.


Position details: Clerk
Name: Miss Jenny M Bosten **Job title:** Clerk
Social security number: JW685626A **Pay ref:** 10100525 **Pers ref:** 10100525

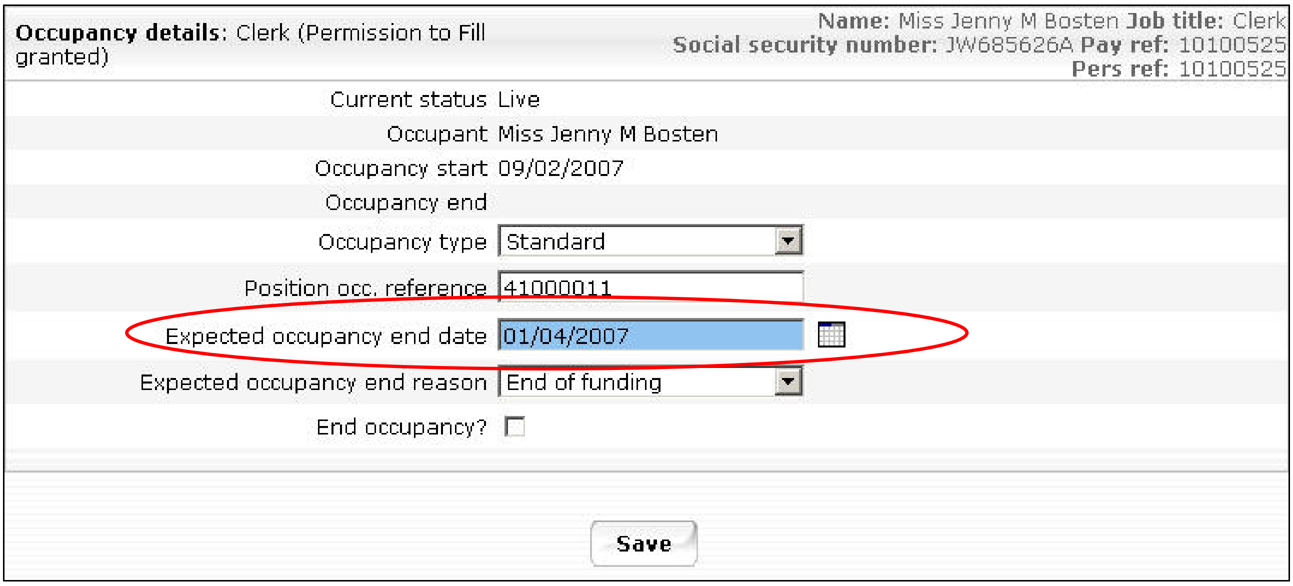
Job title	Clerk
Start date	07/02/2007
End date change?	
End date	
Position reference	70000016
Probationary period	
Location	
Occupant	Miss Jenny M Bosten
Reporting unit	Training
Reports to	Clerk Ms Louisa May (07/02/2007 -)
Expected position end date	01/04/2007
Expected position end reason	End of funding
Structure group 1	Unified Administrative Service
Structure group 2	

Position status

Position status	Permission to Fill granted
Effective from	07/02/2007

Third party return details

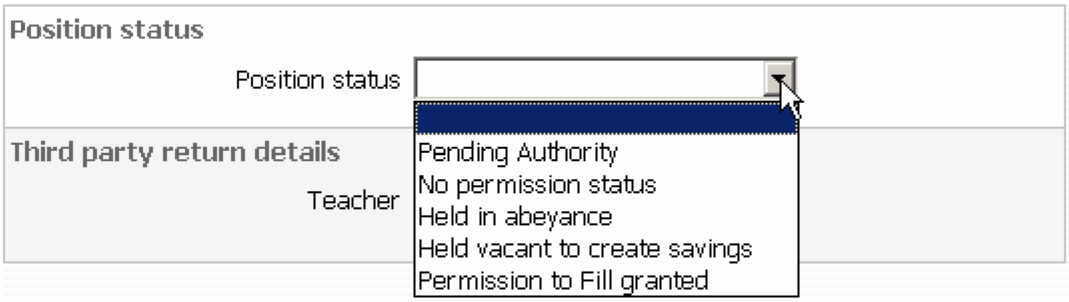
Teacher	


Occupancy details: Clerk (Permission to Fill granted)
Name: Miss Jenny M Bosten Job title: Clerk
Social security number: JW685626A Pay ref: 10100525
Pers ref: 10100525
Current status Live
Occupant Miss Jenny M Bosten
Occupancy start 09/02/2007
Occupancy end
Occupancy type Standard
Position occ. reference 41000011
Expected occupancy end date 01/04/2007
Expected occupancy end reason End of funding
End occupancy?
Save

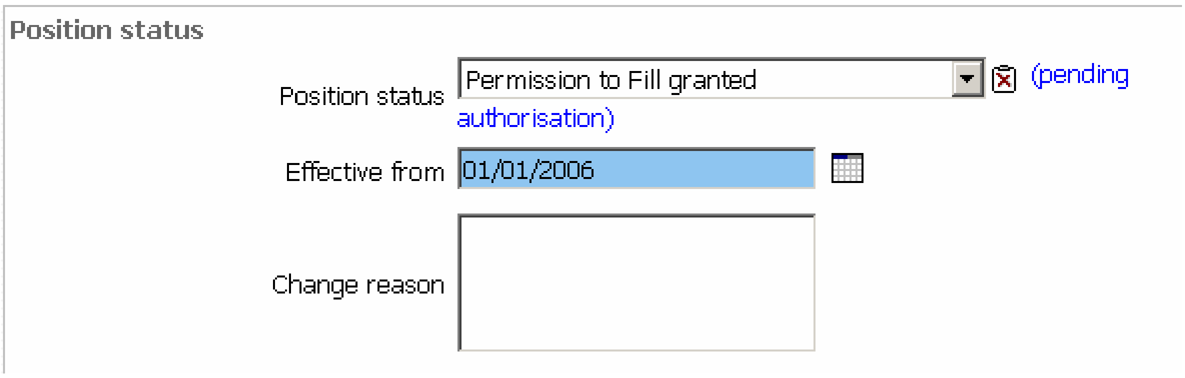
8.1 Changing Permission to fill status

A position reference number is automatically generated by Trent when a position is created. Also the permission to fill status will automatically be set to Permission to Fill granted for a new position. Subsequently where the position status requires changing:

1. Select the position.
2. Select position details
3. Click the drop down arrow to the right of Position Status.



4. For a new position the position status will automatically be set to permission to fill granted. When the position status is changed to permission to fill on the strength of a letter from the Resource Management Committee section, the letter reference number ("ACD reference") is to be put in the Change Reason box.

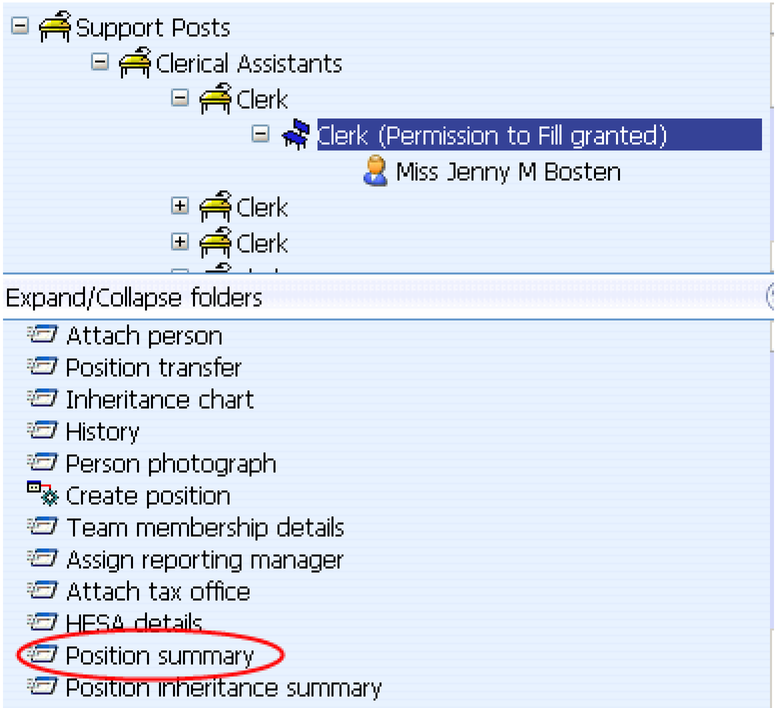


Note: No permission status and Pending authority position status are used for migration purposes. Held vacant to create savings is equivalent to VH in SECQUS. Held in abeyance is used for Senior academic promotions.

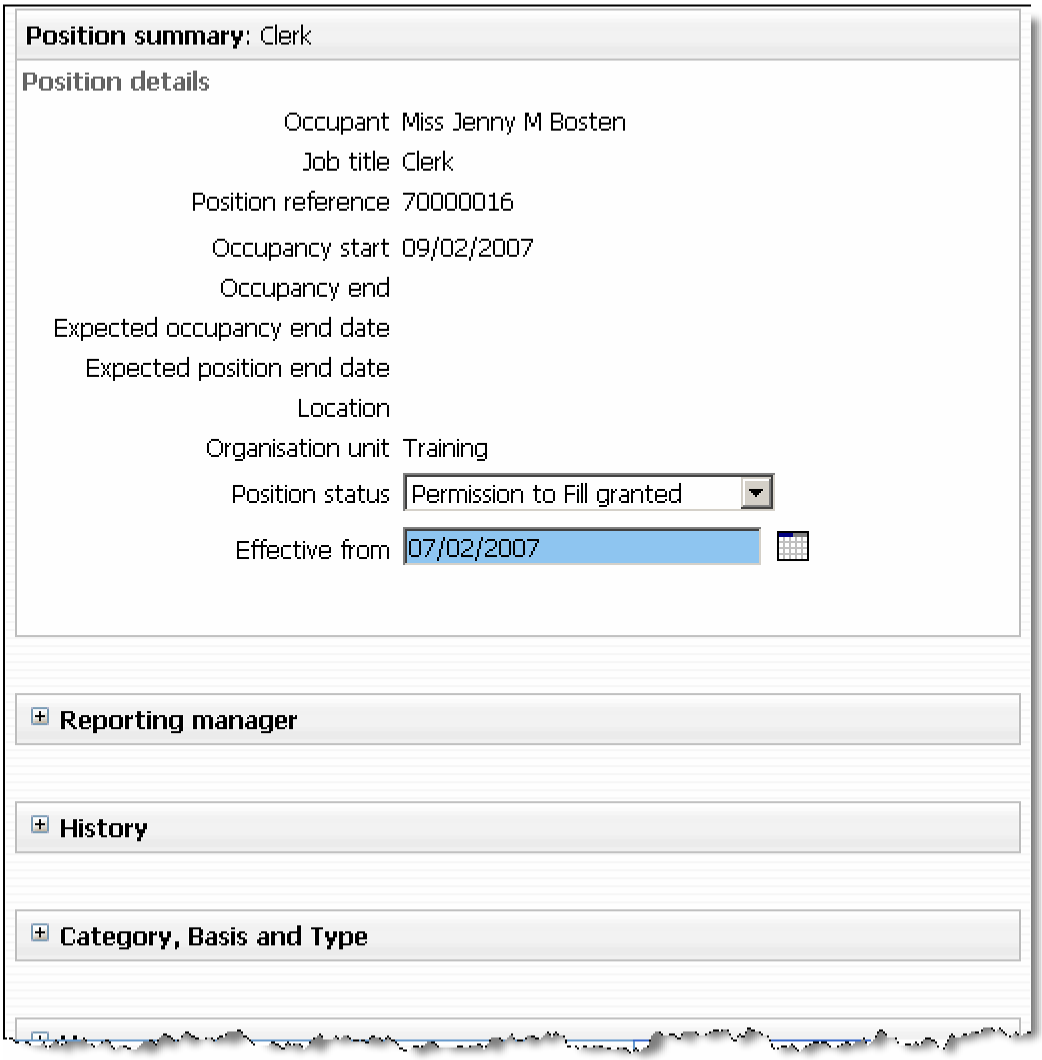
8.2 Position Summary Screen

The Position summary screen provides a means of viewing position information all together in one place.

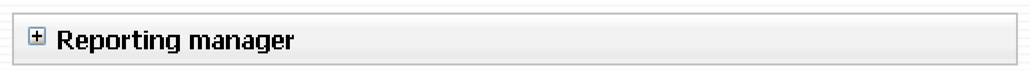
1. Select the position and choose position summary

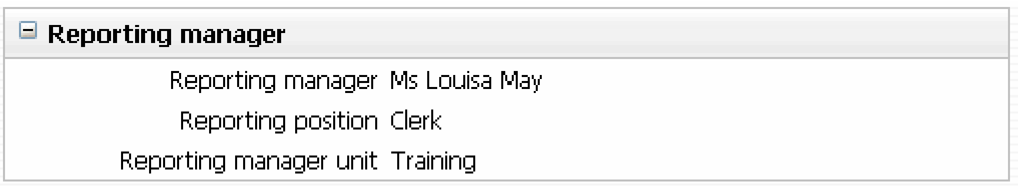


2. The position summary screen will be displayed.



3. To view specific details click on the expand icon



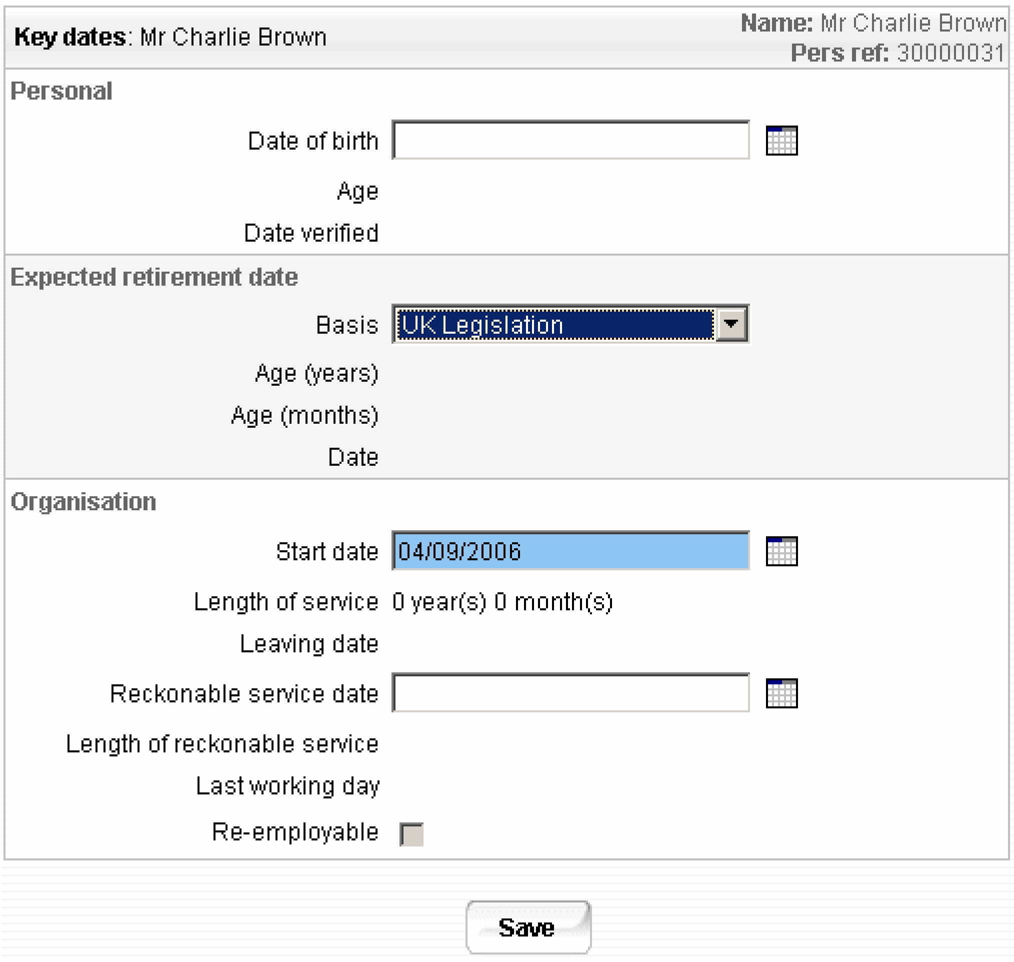


9 Personal Details

Personal details are obtained in the first instance from the New Appointment Request Form CHRIS/10 and the Certificate of Acceptance CHRIS/20. Changes to these details can then subsequently be made as necessary. These details cover changes to personal details that have contractual issues.

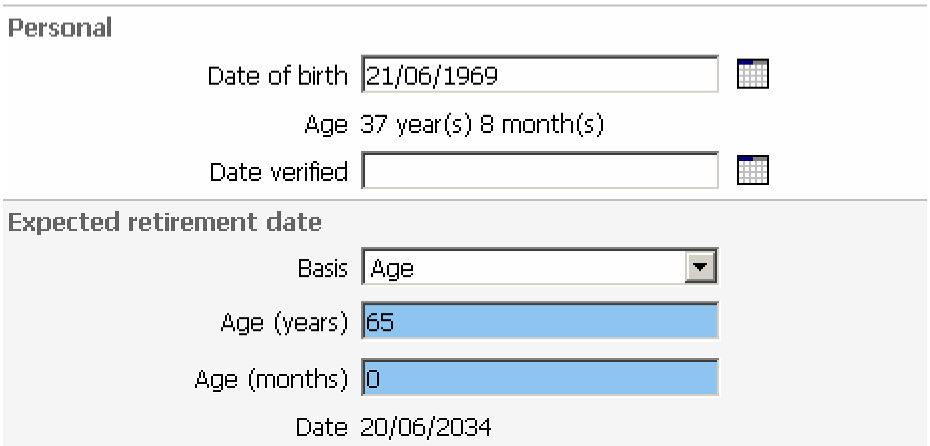
9.1 Adding Key Date details

1. Use the search facility to locate the person whose details you wish to maintain or if already working with the correct record use the navigation trail to return to the people menu
2. Select Key date details from the Action pane
   The key date details form will be displayed

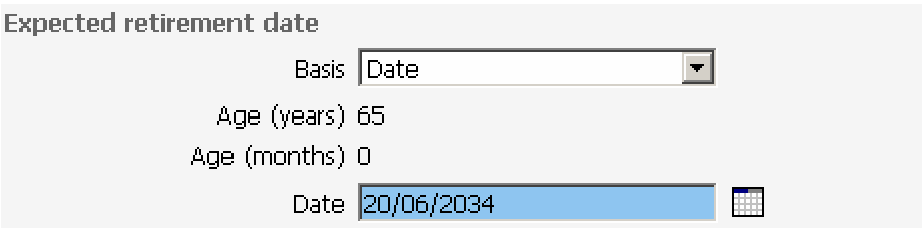


3. Enter Date of Birth. This can be obtained from the CHRIS/10 or CHRIS/20

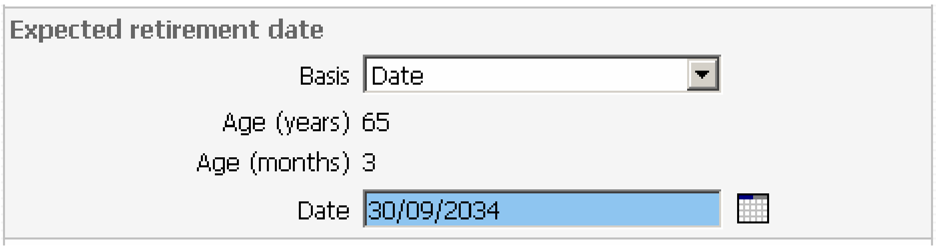
4. Enter expected retirement date. Select "Date" from the Basis drop down list and input 30 September of the academic year in which the individual turns 65 (Unestablished/Assistants) or 67 (Established)
5. To save calculating this date first enter expected retirement date basis of Age and type in 65 if an unestablished or assistant position or 67 if established.



6. Click on the Save button



7. This will automatically calculate the correct year, for those people with a birthday on or before 30th September which can then be manually changed to the 30th of September for that academic year. For those birthdays after 30th September, the year will need to be changed to the following year.



Enter this date and click on the Save button.

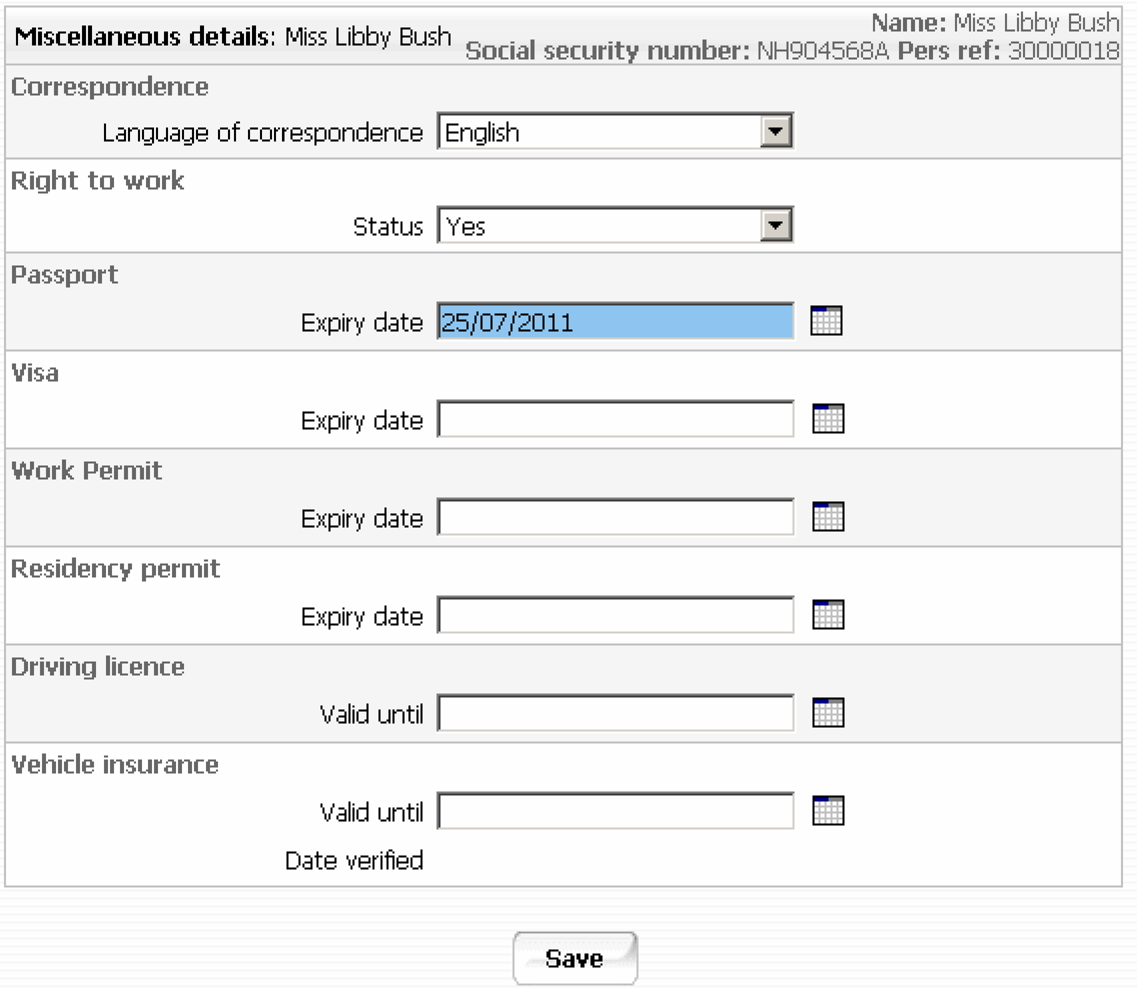
8. Enter Reckonable service date. This will be the same as the organisation start date except where an employee is joining under TUPE conditions or some other arrangement where previous service is to be recognised. This field *must* be completed for reporting purposes and Trent will not pick up the organisation start date if it is left blank. For a student reckonable service should not be entered.
9. Click the Save button

9.2 Miscellaneous Details

Miscellaneous details provides summary details of expiry dates of passport, visa, work permit and residency permit. If you change the latest date(s) on this page, then the date(s) displayed on the relevant details page will also be changed and vice versa.

9.2.1 Amending miscellaneous Details

1. Use the search facility to locate the person whose details you wish to maintain or if already working with the correct record use the navigation trial to return to the people menu.
2. Select Miscellaneous details
   The miscellaneous details screen will be displayed



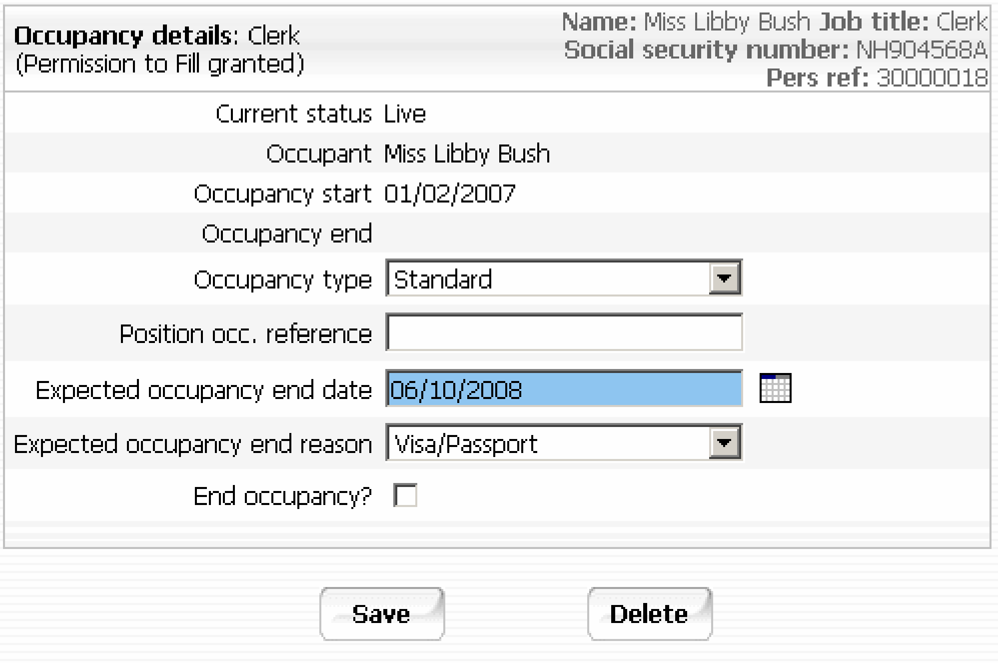
3. Enter the appropriate changes for the employee
4. Click the Save button.

9.3 Occupancy details

Where a persons employment for the University is dependent upon having a visa, work permit or residency permit, the expiry date of these documents should be recorded on the appropriate form and also the date of expiry should be recorded as the expected occupancy end date.

1. Use the navigation trail to return to the people menu
2. Select Employment, Positions

3. Select Occupancy details and enter the effective date
   The occupancy details form will be displayed



Occupancy details: Clerk
(Permission to Fill granted)

Name: Miss Libby Bush **Job title:** Clerk
Social security number: NH904568A
Pers ref: 30000018

Current status	Live
Occupant	Miss Libby Bush
Occupancy start	01/02/2007
Occupancy end	
Occupancy type	Standard
Position occ. reference	
Expected occupancy end date	06/10/2008
Expected occupancy end reason	Visa/Passport
End occupancy?	

Save Delete

4. Enter the expected occupancy end date as the same date as the visa/work permit or residency permit expiry date and expected occupancy end reason as Visa/Passport

5. Click the 

button.